



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) Second and Final Account and Supplemental Account and Report of
Conservator, (2) for Compensation to Conservator's Attorney and (3) for
Distribution of Assets on Death of Conservatee [Prob. C. 2620, 2640 & 2320(c)(4)]

DOD: 11/14/10		TERRI LYNN CURTIS , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 07/04/07 – 11/14/10	1. Need Order.
Cont. from		Accounting - \$886,507.27	2. Need copies of bank statements and care facility invoices pursuant to Probate Code § 2620(c).
	Aff.Sub.Wit.	Beginning POH - \$692,345.71	Note: Petitioner may only be discharged and the bond exonerated upon filing of an Ex Parte Petition for Final Discharge and Order.
✓	Verified	Ending POH - \$661,998.93	
	Inventory		
	PTC	Subsequent Account period: 11/15/10 – 02/28/11	
	Not.Cred.	Accounting - \$661,998.93	
✓	Notice of Hrg	Beginning POH - \$661,998.93	
✓	Aff.Mail w/	Ending POH - \$4,588.40	
	Aff.Pub.	Conservator - waives	
	Sp.Ntc.	Attorney - \$12,539.25	
	Pers.Serv.	(itemized for preparation of Petition for appointment as conservator of the person, preparation of the first account and court appearance for same, correspondence re bond, ongoing advice and discussion with petitioner regarding conservatorship matters, assisting conservator after the death of conservatee, preparation of the second account)	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	2620(c)		
	Order x		
	Aff. Posting	Attorney costs - \$1,690.00 (for filing fees, service of process, bond premium)	
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice	Petitioner prays for an Order: <ol style="list-style-type: none"> 1. Approving, allowing and settling the Second and Final Account; 2. Authorizing the attorney fees and costs; 3. Approving distribution of any remaining assets in the conservatorship after payment of fees and costs be distributed to the heirs and devisees of the Conservatee, upon filing of the appropriate declaration pursuant to Probate Code § 13100. 4. Releasing conservator from liability and exonerating her bond, upon the filing of receipts on behalf of the distributees. 	
			Reviewed by: JF Reviewed on: 12/04/12 Updates: Recommendation: File 1 - Cline

(1) First and Final Account and Report of Executor and (2) Petition for Its Settlement, for Allowance of Statutory Fees and Commissions and for (3) Final Distribution Under Will (Prob. C. 11002, 10810, 10800, 11640)

DOD: 10/3/2006			LARRY G. STEWART , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 10/3/06 – 9/90/12	
Cont. from			Accounting - \$245,000.00	
	Aff.Sub.Wit.		Beginning POH - \$245,000.00	
✓	Verified		Ending POH - \$ 72,531.51	
✓	Inventory		Executor (statutory) - \$4,330.00	
✓	PTC		Attorney (statutory) - \$4,330.00	
✓	Not.Cred.		Closing - \$2,500.00	
✓	Notice of Hrg		Distribution, pursuant to Decedent's Will and Codicil, is to:	
✓	Aff.Mail	W/O	<ul style="list-style-type: none"> Bhrittney O'Brien - \$2,283.56 Derek Strong - \$482.19 Kyle Brandau - \$1,509.04 Patricia D. Brandau, in Trust, on behalf of her minor daughter, Bethany Brandau - \$1,509.04 Shelley A. Phebus, in trust on behalf of her minor daughter, Stacy Phebus - \$1,509.04 Shelley A. Phebus, in trust on behalf of her minor daughter, Shelley, "Stephanie" Phebus - \$1,509.04 Patricia D. Brandau - \$1.00 Richard L. Steward - \$13,142.13 Linda S. Clark - \$13,142.13 Larry G. Stewart - \$13,142.13 Shelley A. Phebus - \$13,142.13 	
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice	N/A		
			Reviewed by: KT	
			Reviewed on: 12/4/12	
			Updates:	
			Recommendation:	
			File 2 – O'Brien	

DOD: 1-8-09		MANUEL N. VIERRA , Attorney for Executor James L. Elder, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		JAMES L. ELDER was appointed Executor with Full IAEA without bond and Letters issued on 3-3-09.	<u>Continued from 10-2-12 at request of counsel.</u> Attorney Vierra served notice of continued hearing on interested parties.
Cont. from 100212		Final Inventory and Appraisal filed 2-22-11 reflects a total estate value of \$205,337.78 , including \$66,337.78 cash and real property in Fresno and Tulare Counties.	Note: Decedent's will dated 12-10-08 devises specific personal property items to various charities and/or organizations, and devises the residue of the estate to the Fresno State University Foundation.
<input checked="" type="checkbox"/>	Aff.Sub.Wit.	Petitioner requests permission to withdraw as attorney of record under California Rule of Professional Conduct Rule 3-700(C) in that he has been unable to carry out his duties effectively because he has been unable to communicate with his client since receiving his letter of August 31, 2011 (attached).	Note: The Court will set a status hearing for Executor's Failure to File Petition for Final Distribution on Friday 2-1-13.
<input checked="" type="checkbox"/>	Aff.Mail		
<input checked="" type="checkbox"/>	Aff.Pub.	Petitioner states six (6) letters to his client between 8-9-10 and 7-3-12 (attached), and states the only response received is the client's letter dated 8-31-11.	1. Need Order.
<input checked="" type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input checked="" type="checkbox"/>	Aff. Posting		
<input checked="" type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 12-5-12
			Updates:
			Recommendation:
			File 3 - Jaquay

DOD: 1/17/2009		ZAYDA SALLY GALLEGOS,	NEEDS/PROBLEMS/COMMENTS:
		Administrator, is petitioner.	
		Accounting is waived.	
Cont. from			
	Aff.Sub.Wit.	I & A - \$140,000.00	
✓	Verified	POH - \$ 60,303.23	
✓	Inventory		
✓	PTC	Administrator - \$4,600.00 (statutory)	
✓	Not.Cred.		
✓	Notice of Hrg	Attorney - \$4,600.00 (statutory)	
✓	Aff.Mail	W/O Closing - \$2,500.00	
	Aff.Pub.		
	Sp.Ntc.	Distribution, pursuant to intestate succession, is to:	
	Pers.Serv.		
	Conf. Screen		
✓	Letters	6/23/09 Zayda Sally Gallegos - \$16,201.08	
	Duties/Supp	Ruben Trujillo - \$16,201.08	
	Objections	Maria Norma Farley - \$16,201.08	
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

Reviewed by: KT
Reviewed on: 12/4/12
Updates:
Recommendation: SUBMITTED
File 4 - Trujillo

(1) Waiver of Account and First and Final Report of Executor (2) Petition for Allowance of Statutory Fees to Attorney and (3) Final Distribution

DOD: 11/30/2009		LINDA HANSEN and MARY MOSSETTE , Co-Executors, are Petitioners.		NEEDS/PROBLEMS/COMMENTS:	
		Accounting is waived.		1. The beneficiary of this estate is the Decedent's Intervivos Trust. The Executors are also the Co- Trustees of the Trust. Therefore, need proof of service of the Notice of Hearing on the beneficiaries of the Trust pursuant to Probate Code § 1208(b)	
Cont. from				2. Need proof of service of the Notice of Hearing along with a copy of the Petition on:	
	Aff.Sub.Wit.	I & A	-	\$489,268.58	a. Steven Diebert
✓	Verified	POH	-	\$ 13,000.00	b. Heather Kruthers of County Counsel
✓	Inventory	Executors	-	waive	- Pursuant to their Requests for Special Notice.
	PTC				3. Need Trustee's written acceptance of the trust pursuant to Probate Code § 10694(b)(4).
✓	Not.Cred.	Attorney	-	\$12,685.38	4. Need Declaration of Co- Trustee pursuant to Local Rule 7.12.5
		(statutory)			5. Need Property Tax Certificate.
✓	Notice of Hrg	Distribution, pursuant to Decedent's Will, is to:			6. Petition states there were no creditor's claims filed. On 3/21/11 a Creditor's Claim was filed by Ponderosa Telephone in the amount of \$74.23.
✓	Aff.Mail				7. Petition states expenses remain due and payable, as follows:
					<ul style="list-style-type: none"> Steven Diebert - \$525.00 Fresno County Public Guardian's Office - \$532.45
	Aff.Pub.	Mary Mossette and Linda Hansen as Co-Trustees of the Daryl and Alma Brooks 1995 Trust.			- However there prayer does not include payment for these expenses. Need clarification.
	Sp.Ntc.				8. Petition does not list and describe in detail the property to be distributed. Local Rule 7.12.1.
	Pers.Serv.				9. Need Order.
	Conf. Screen				
✓	Letters	3/2/09			
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	9202				
	Order			X	
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
✓	FTB Notice				
				Reviewed by: KT	
				Reviewed on: 12/4/12	
				Updates:	
				Recommendation:	
				File 5 - Brooks	

Atty Downing, Marcella (for Petitioner Jimmie Dale Reis)

(1) First and Final Report of Administration on Waiver of Account and (2) Petition for Final Distribution, for (3) Allowance of Compensation to Administrator and Attorney for Ordinary Services, and for Fees (Prob. C. 10400-10406, 10954, 11600-11642, 10810)

DOD: 9/27/11		JIMMIE DALE REIS , Administrator, is petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Accounting is waived.		1. Property on hand includes a 1996 Honda Civic, household furniture and furnishings, tools and equipment located at the real property and coins however these items are not included in the proposed distribution. 2. Order does not comply with Local Rule 7.6.1. Need new order	
Cont. from		I & A - \$580,968.75			
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$589,711.24			
<input checked="" type="checkbox"/>	Verified	Administrator (statutory) - \$14,823.98			
<input checked="" type="checkbox"/>	Inventory	Attorney (less than statutory) - \$12,998.98			
<input checked="" type="checkbox"/>	PTC	Costs (filing fees, certified copies, recorder) - \$946.00			
<input checked="" type="checkbox"/>	Not.Cred.	Closing - \$8,743.49			
<input checked="" type="checkbox"/>	Notice of Hrg	Petition states the estate is short on cash to pay the expenses of administration. The beneficiaries wish to retain the real property and have agreed to pay the needed cash for payment of the final expenses to cover the shortfall of liquid assets in order to avoid the sale of the real property.			
<input checked="" type="checkbox"/>	Aff.Mail	W/			
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.				
<input type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters	3/5/12		Reviewed by: KT Reviewed on: 12/4/12 Updates: Recommendation: File 6 - Reis	
<input type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input type="checkbox"/>	CI Report				
<input checked="" type="checkbox"/>	9202	Marilyn Goddard			
<input checked="" type="checkbox"/>	Order	Ronald Reis			
<input type="checkbox"/>	Aff. Posting	Joanne Sutphin			
<input type="checkbox"/>	Status Rpt	Jimmie Dale Reis			
<input type="checkbox"/>	UCCJEA	Jimmie Dale Reis, as Administrator of the Estate of Henry Reis, Jr.			
<input type="checkbox"/>	Citation				
<input checked="" type="checkbox"/>	FTB Notice				

(1) First and Final Account and Report of Administrator and (2) Petition for Its Settlement, for Allowance of Compensation to Administrator and Attorneys for Ordinary Services and for (3) Final Distribution

DOD: 02/26/12	ELBERT ROCQUEMORE , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 02/26/12 – 08/31/12	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$265,458.71	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$265,000.00	
<input checked="" type="checkbox"/> Inventory	Ending POH - \$134,617.31 (all cash)	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.	Administrator - \$8,309.17 (statutory)	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail w/o	Attorney - \$8,309.17 (statutory)	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Costs - \$1,498.00 (for filing fees, publication, certified copies, probate referee)	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters 04/30/12	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	Elbert Rocquemoire, Jr. - \$38,833.62	
<input type="checkbox"/> CI Report	Ruby Janice Owen - \$19,416.84	
<input checked="" type="checkbox"/> 9202	Catherine Elaine Roy - \$19,416.84	
<input type="checkbox"/> Order	Robin Lee - \$19,416.84	
<input type="checkbox"/> Aff. Posting	Michael Anthony Roy - \$19,416.83	
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/04/12
		Updates:
		Recommendation: SUBMITTED
		File 7 - Rocquemoire

Atty Arthur, Susan K., of Walton & Mitchell (for Petitioner Cynthia Campbell)

(1) First and Final Account and Report of Executor and Petition for Its Settlement,
 (2) for Allowance of Compensation for Ordinary Services and (3) for Final
 Distribution [Prob. C. 1095]

DOD: 11/30/2011		CYNTHIA CAMPBELL , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 11/30/2011 – 10/29/2012	
		Accounting - \$54,750.00	<div> Reviewed by: LEG Reviewed on: 12/5/12 Updates: Recommendation: SUBMITTED File 8 – Goforth </div>
Cont. from		Beginning POH - \$54,750.00	
<input type="checkbox"/>	Aff.Sub.Wit.	Ending POH - \$54,750.00 (no cash)	
<input checked="" type="checkbox"/>	Verified	Executor - waives	
<input checked="" type="checkbox"/>	Inventory	Attorney - \$2,190.00 (statutory; to be paid outside probate)	
<input checked="" type="checkbox"/>	PTC	Costs - \$1,312.00 (filing fees, probate referee, publication, certified copies; to be paid outside probate)	
<input checked="" type="checkbox"/>	Not.Cred.	Distribution pursuant to Decedent's Will and to the Assignments of Beneficiaries' Interest in Estate Property filed 10/31/2012 is to:	
<input checked="" type="checkbox"/>	Notice of Hrg	<ul style="list-style-type: none"> DONALD L. GOFORTH – an undivided 1/3 interest in automobiles, boat, trailers, jewelry, clothing, household furnishings, and books. CYNTHIA CAMPBELL – an undivided 1/3 interest in automobiles, boat, trailers, jewelry, clothing, household furnishings, books, and 41.3813% interest in real property. JEANINE SHUMWAY – an undivided 1/3 interest in automobiles, boat, trailers, jewelry, clothing, household furnishings, books, and 41.3813% interest in real property. 	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input type="checkbox"/>	Letters	052412	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

		BROOKE A. PARICHAN , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:					
		Petitioner alleges: The Brooke A. Parichan 2007 Irrevocable Trust was established on 8/24/2007 by ROD PARICHAN and CYNTHIA PARICHAN, as settlors.	OFF CALENDAR. Request for Dismissal entered on 12/5/12					
Cont. from 111312								
	Aff.Sub.Wit.							
✓	Verified							
	Inventory							
	PTC							
	Not.Cred.							
✓	Notice of Hrg							
✓	Aff.Mail	W/						
	Aff.Pub.							
	Sp.Ntc.							
	Pers.Serv.							
	Conf. Screen							
	Letters							
	Duties/Supp							
	Objections							
	Video Receipt							
	CI Report							
	9202							
✓	Order							
	Aff. Posting							
	Status Rpt							
	UCCJEA							
	Citation							
	FTB Notice							
		<p>The Current Trustee and income beneficiary is Brooke A. Parichan. The first contingent beneficiary of the Trust are the issue of Brooke A. Parichan. The second contingent beneficiary of the Trust is REID R. PARICHAN. The third contingent beneficiary of the Trust are the issue of REID R. PARICHAN. Neither Brooke nor Reid currently have any issue. The remote contingent beneficiaries of the trust are EDWINA SMITH, the heirs of CYNTHIA K. PARICHAN, SUSAN PARICHAN-HABILD, TRACI NICOLE PRICE, the issue of TRACY NICOLE PRICE, CHRISTIAN PARICHAN HANSEN, the issue of CHRISTIAN PARICHAN HANSEN, and the heirs of ROD PARICHAN. There are no minor beneficiaries of the Trust.</p> <p>Under Probate Code § 15404, if the settlors and all the beneficiaries of an irrevocable trust consent, they may compel modification of the trust. The settlors and all the beneficiaries have consented to the modification of the Trust.</p> <p>Chuck Baker has been appointed as guardian ad litem to represent all the unborn and unascertained beneficiaries.</p> <p style="text-align: center;">Please see additional page</p>	<table border="1"> <tr><td>Reviewed by: KT</td></tr> <tr><td>Reviewed on: 12/4/12</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 10 - Parichan</td></tr> </table>	Reviewed by: KT	Reviewed on: 12/4/12	Updates:	Recommendation:	File 10 - Parichan
Reviewed by: KT								
Reviewed on: 12/4/12								
Updates:								
Recommendation:								
File 10 - Parichan								

The trust is currently considered to be a "grantor trust" under the federal tax laws. That means that all income taxes generated by the assets of the Trust are taxable to the settlors. The current asset of the Trust is a life insurance policy. Since the growth in a life insurance policy is not taxable, the status of the Trust as a grantor trust has not been a concern. However, the settlors would like to gift other assets to the Trust but do not want to be subject to paying the income taxes generated by the Trust. The income generated by the Trust could be significant and that would cause substantial income tax issues.

Under Section 4.2 of the Trust, the trustee may pay premium payments on life insurance policies from the net income of the Trust. Under Section 677(a)(3) of the Internal Revenue Code, this provision causes the Trust to be a grantor trust. Petitioner requests that the Trust be modified to delete Section 4.2. The income generated by the Trust would then be taxable to the Trust or its beneficiaries.

In addition, Section 4.2 of the Trust currently provides for income distributions to the beneficiary but not principal distributions until the death of the surviving settlor. Again, because the only asset is a life insurance policy there are no principal assets to be distributed until the policy proceeds are paid at the death of the surviving settlor. The distributive provisions under Articles Five and Six are not effective until the death of the surviving settlor. If the settlors gift other assets to the Trust, then there needs to be a provision in the Trust that govern the distribution of principal and income during the lifetimes of the settlors. Petitioner requests that Article Five of the Trust be deleted and Article Six of the Trust be modified so that it governs the distribution of principal and income both during the lifetimes of the settlors and after the death of the surviving settlor. The beneficial interests of the Trust will not change as a result of this proposed modification.

Petitioner prays for an order:

1. Modifying the Trust as set forth in the Petition;
2. For such other orders as the Court may deem proper.

		REID R. PARICHAN , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:					
		Petitioner alleges: The Reid R. Parichan 2007 Irrevocable Trust was established on 8/24/2007 by ROD PARICHAN and CYNTHIA PARICHAN, as settlors.	OFF CALENDAR. Request for Dismissal entered on 12/5/12					
Cont. from 111312								
	Aff.Sub.Wit.							
✓	Verified							
	Inventory							
	PTC							
	Not.Cred.							
✓	Notice of Hrg							
✓	Aff.Mail	W/						
	Aff.Pub.							
	Sp.Ntc.							
	Pers.Serv.							
	Conf. Screen							
	Letters							
	Duties/Supp							
	Objections							
	Video Receipt							
	CI Report							
	9202							
✓	Order							
	Aff. Posting							
	Status Rpt							
	UCCJEA							
	Citation							
	FTB Notice							
		<p>The Current Trustee and income beneficiary is Reid R. Parichan. The first contingent beneficiary of the Trust are the issue of Reid R. Parichan. The second contingent beneficiary of the Trust is Brooke A. Parichan. The third contingent beneficiary of the Trust are the issue of Brooke A. Parichan. Neither Reid nor Brooke currently have any issue. The remote contingent beneficiaries of the trust are EDWINA SMITH, the heirs of CYNTHIA K. PARICHAN, SUSAN PARICHAN-HABILD, TRACI NICOLE PRICE, the issue of TRACY NICOLE PRICE, CHRISTIAN PARICHAN HANSEN, the issue of CHRISTIAN PARICHAN HANSEN, and the heirs of ROD PARICHAN. There are no minor beneficiaries of the Trust.</p> <p>Under Probate Code § 15404, if the settlors and all the beneficiaries of an irrevocable trust consent, they may compel modification of the trust. The settlors and all the beneficiaries have consented to the modification of the Trust.</p> <p>Chuck Baker has been appointed as guardian ad litem to represent all the unborn and unascertained beneficiaries.</p> <p style="text-align: center;">Please see additional page</p>	<table border="1"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 12/4/12</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 11 - Parichan</td> </tr> </table>	Reviewed by: KT	Reviewed on: 12/4/12	Updates:	Recommendation:	File 11 - Parichan
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Reviewed on: 12/4/12								
Updates:								
Recommendation:								
File 11 - Parichan								

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Under Section 4.2 of the Trust, the trustee may pay premium payments on life insurance policies from the net income of the Trust. Under Section 677(a)(3) of the Internal Revenue Code, this provision causes the Trust to be a grantor trust. Petitioner requests that the Trust be modified to delete Section 4.2. The income generated by the Trust would then be taxable to the Trust or its beneficiaries.

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Petitioner prays for an order:

3. Modifying the Trust as set forth in the Petition;
4. For such other orders as the Court may deem proper.

Age: 50		MARGARET A. YOUNG , sister, is petitioner and requests appointment as Conservator of the person, with medical consent powers. Declaration of Bradley T. Wajda, M.D. 07/09/2012, supports request for medical consent powers. Petitioner states: the proposed conservatee's mother was very ill when she was pregnant with the proposed conservatee. As a result, the proposed conservatee was deprived of oxygen. The proposed conservatee is autistic and developmentally challenged. Court Investigator Julie Negrete's report filed 12/04/2012.	NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 11/16/2012. Voting Rights Affected Need Minute Order 1. Need proof of service at least fifteen (15) days prior to the hearing of Notice of Hearing with a copy of the Petition for Appointment of Conservator for: <ul style="list-style-type: none"> Annie Tafoya (Maternal Grandmother)
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: KT / LV Reviewed on: 12/04/2012 Updates: Recommendation: File 12 - Young	

DOD: 2/11/12		CLYDE JAMES JONES , Executor, is petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Accounting is waived.		1. Need Trustee's written acceptance of the trust pursuant to Probate Code §10694(b)(4).	
Cont. from		I & A - \$310,000.00		2. Need Declaration of Trustee pursuant to Local Rule 7.12.5	
	Aff.Sub.Wit.	POH - \$320,800.00			
✓	Verified	Executor - waives			
✓	Inventory	Attorney - \$9,416.00			
✓	PTC	(statutory)			
✓	Not.Cred.	Costs - \$494.00 (filing fee, certified copies, recording fee)			
✓	Notice of Hrg	Distribution, pursuant to Decedent's Will, is to:			
	Aff.Mail	Clyde James Jones as trustee of the Bonnie M. Jones Trust, 2000 – real property located at 2891 Holland in Clovis.			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
✓	Letters	4/4/12			
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	9202				
✓	Order				
	Aff. Posting			Reviewed by: KT	
	Status Rpt			Reviewed on: 12/4/12	
	UCCJEA			Updates:	
	Citation			Recommendation:	
✓	FTB Notice			File 15 - Jones	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age:		NEEDS/PROBLEMS/COMMENTS:	
DOD:			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			OFF CALENDAR. Order terminating temporary guardianship and vacating hearing on the general guardianship was signed on 11/28/12.
			Reviewed by: KT
	Reviewed on: 12/5/12		
	Updates:		
	Recommendation:		
	File 16A - Fernandez		

Request for Hearing about Court Fee Waiver Order

			NEEDS/PROBLEMS/COMMENTS: Confidential matter.
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 12/5/12
			Updates:
			Recommendation:
			File 16B – Fernandez

16B